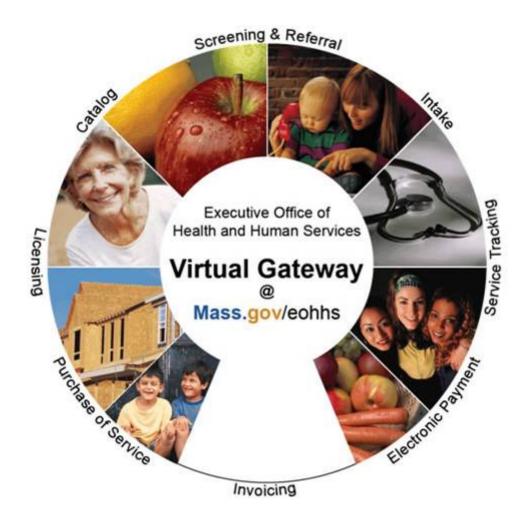
Commonwealth of Massachusetts Executive Office of Health and Human Services

Virtual Gateway



Salary Reserve FY 2007 Reference Guide September 2006

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Chapter 1: Accessing Provider Data Management to View Salary Reserve Data

Introduction

This section of the Provider Data Management (*PDM*) Service is for the implementation of a data collection web-based application which will collect payroll data from providers and will facilitate the distribution of approximately \$28M to Purchase of Service contractors who provide human and social services to Commonwealth clients.

The Salary Reserve web application provides Purchase of Service (POS) providers and EOHHS agency staff with access to real-time data over the internet. The Salary Reserve web application will be the system of record for all of the Salary Reserve data content. This application will be made available whenever Salary Reserve is part of the Budget.

You can access *PDM* to

- view
- update
- manage

Salary Reserve FY 2007 data.

Accessing PDM through the Virtual Gateway To access PDM:

- 1. Open a web browser.
- 2. Type Web address www.mass.gov/eohhs in browser.

Health and Human Services portal page appears.

3. Click the **Manage Provider Data** link.

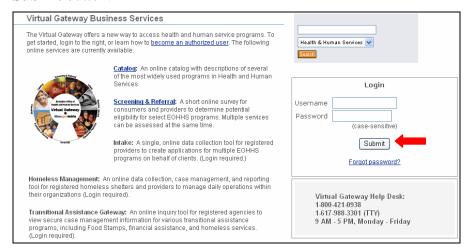




Virtual Gateway Business Services portal page appears for login.

Note: Security requires that each person have a username and password.

4. Enter your **Username** and **Password** in the **Login** box, and then click the **Submit** button.



The post-login, Virtual Gateway Business Services portal page appears.



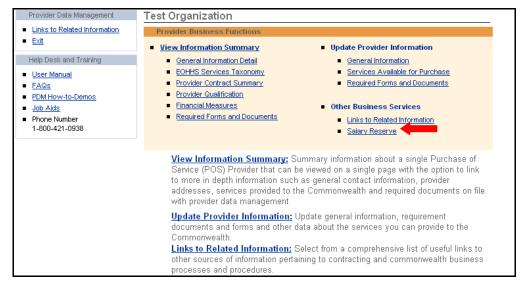
Once logged in, you have access to the Virtual Gateway services. To access *PDM*, click the **View Purchase of Service Provider Data** link.

The **Provider Business Functions** page appears.



Viewing the Provider Business Functions Page

Access the **Salary Reserve Data Summary** page by clicking the <u>Salary</u> Reserve link from the **Business Functions** page



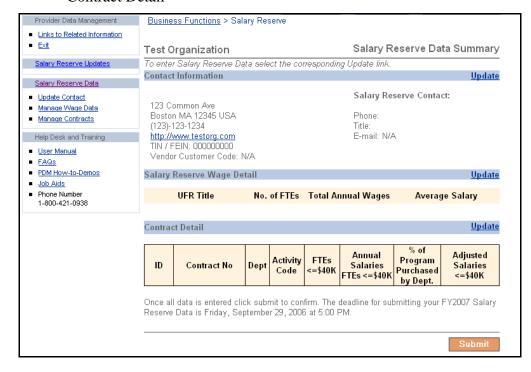
The Salary Reserve Data Summary page appears.



Accessing the Salary Reserve Data Summary Page You will only be able to view, manage and update data that pertains to your organization.

The following information is viewable from this page:

- Contact Information
- Salary Reserve Wage Detail
- Contract Detail





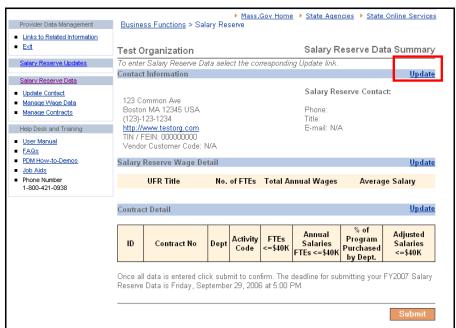
Chapter 2: Managing Salary Reserve Data

Introduction

You can manage or update the following:

- Salary Reserve Contact Information
- Salary Reserve Contract Data
- Wage Data

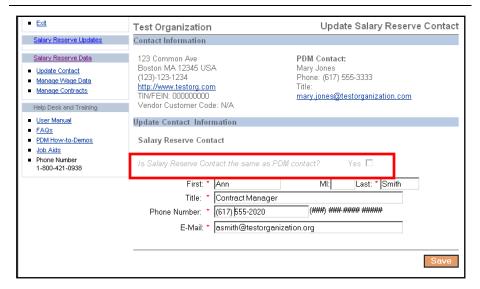
Accessing the Salary Reserve Contact Page To access the **Update Salary Reserve Contact** page, click the **Update** link from the **Salary Reserve Data Summary** page.



The **Update Salary Reserve Contact** page appears.



Updating Salary Reserve Contact information



Tip: If you answer Yes to "Is Salary Reserve Contact the same as PDM contact?" the required fields below are disabled. Then, click



You are returned to the **Salary Reserve Contract Data Summary** page with the updated contact information displaying.

Tip: Asterisk denotes required fields.

To update Salary Reserve Contact information:

- 1. Enter first and last name.
- 2. Enter title.
- 3. Enter phone number

(*Hint:* space for extension up to 5 digits).

- 4. Enter e-mail address.
- 5. Click Save

You are returned to the **Salary Reserve Contract Data Summary** page with the newly entered contact information displaying.



Updating Salary Reserve Contact Information (continued)



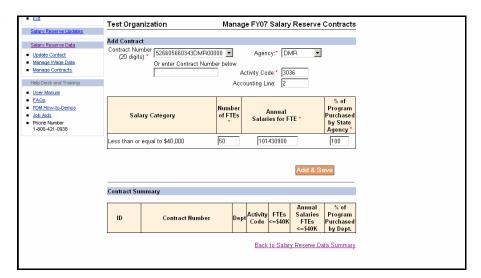
Accessing the Salary Reserve Contract Data Page To access the **Manage FY07 Salary Reserve Contracts** page, click the <u>Update</u> link from the **Salary Reserve Data Summary** page.



The Manage FY07 Salary Reserve Contracts page appears.



Managing FY07 Salary Reserve Contracts



Tips:

- Asterisk denotes required fields.
- Do not use the dollar sign or commas.

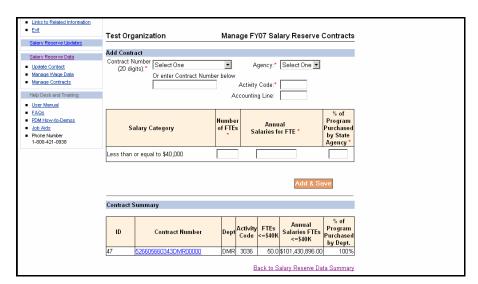
To add a contract to manage FY07 Salary Reserve Contract data:

- 1. Select a contract from the drop down box *or* enter (up to 20 digits) contract number in appropriate field.
- 2. Select the agency from the drop down box.
- 3. Enter activity code.
- 4. Enter accounting line.
- 5. Enter number of FTEs.
- 6. Enter annual salaries for FTEs.
- 7. Enter % of program purchased by State Agency.
- 8. Click Add & Save

The page reappears with the newly entered contact displaying.



Managing FY07 Salary Reserve Contracts (continued)

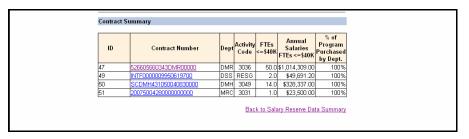


Tips:

To add another contract:

- 1. Enter data.
- 2. Click Add & Save

The contract is added.



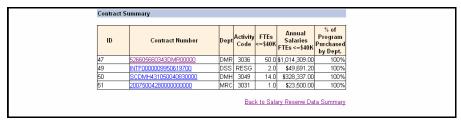
• The unique ID number for each line item corresponds to the contract number, appropriation, and activity code.

Hint: To return to the **Salary Reserve Data Summary** page, click the <u>Back to Salary Reserve Data Summary</u> link.

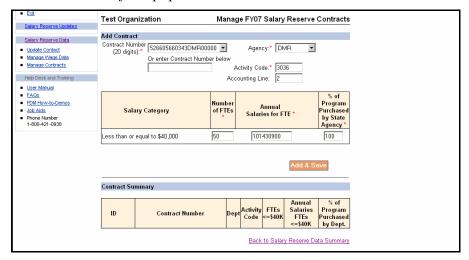


Managing
Existing
Contract Data

To manage an existing contract you have previously entered, click the <u>Contract Number</u> link.



The Manage **FY07 Salary Reserve Contracts** page appears with contract number field populated.



Add contract data, then click



You are returned to the **Manage FY07 Salary Reserve Contracts** page with the updated data displaying.

Caution: If you click Delete, it clears out all the data you entered and the contract record will be deleted.



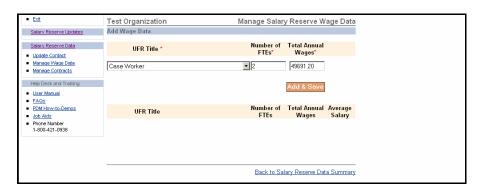
Accessing Manage Salary Reserve Wage Data

To access the **Manage Salary Reserve Wage Data** page, click the **Update** link from the **Salary Reserve Data Summary** page.



The Manage Salary Reserve Wage Data page appears.

Managing Salary Reserve Wage Data



Tip: Asterisk denotes required fields.

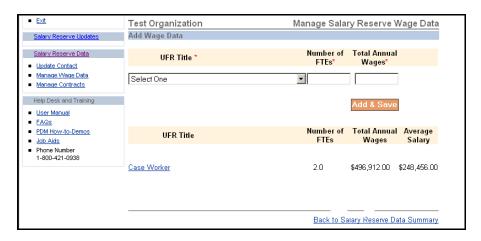
To enter wage data:

- 1. Select UFR title from drop down box.
- 2. Enter number of FTEs.
- 3. Enter total annual wages.
- 4. Click Add & Save

The page reappears with the newly entered data displaying.



Managing Salary Reserve Wage Data (continued)

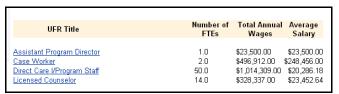


Tip: To add another wage, click Add & Save

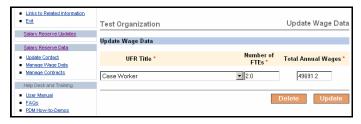
Hint: To return to the **Salary Reserve Data Summary** page, click the <u>Back to Salary Reserve Data Summary</u> link.

Updating Existing Salary Wage Data

To update an existing salary wage data you have previously entered, click the <u>UFR Title</u> link.



The **Update Wage Data** page appears.



Update Wage data, then click

Save .

You are returned to the **Update Salary Reserve Wage Data** page with newly entered data displaying.

Caution: If you click Delete, it clears out all the data you entered and the record will be deleted.



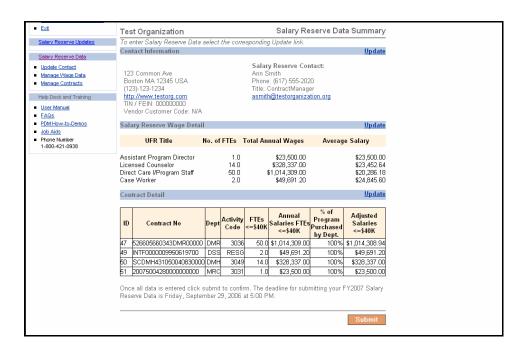
Chapter 3: Confirming FY 2007Salary Reserve Data

Introduction

After the Salary Reserve data for FY 2007 has been entered for your organization, you will need to complete the submittal and confirmation process.

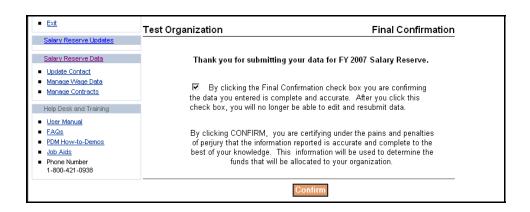
Submitting Salary Reserve Data

Once all FY 2007 Salary Reserve Data has been entered and reviewed, click Submit.



The **Final Confirmation** page appears.

Confirming Salary Reserve Data





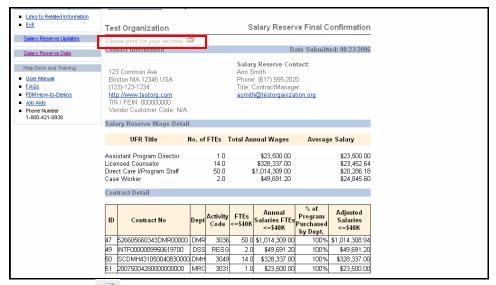
Confirming Salary Reserve Data

To confirm Final Confirmation:

- 1. Click the check box to confirm data entered is complete and accurate.
- 2. Click Confirm

Once data has been confirmed, an email notification will be sent to the Salary Reserve Administrator.

The Salary Reserve Final Confirmation page appears.



3. Click to print a copy of the Salary Reserve Final Confirmation printer friendly version for your records. The printer friendly version of the Salary Reserve Final Confirmation page appears.



Viewing of printer friendly version of the Salary Reserve Final Confirmation

4. View printer friendly version.

Test Organization				S	Salary Reserve Final Confirmation		
Contact Information					Date Submitted: 08/23/2006		
Salary Reserve Contact: 123 Common Ave Ann Smith Boston MA 12345 USA Phone: (617) 555-2020 (123)-123-1234 Title: ContractManager http://www.testorg.com TIN / FEIN: 000000000 Vendor Customer Code: N/A							
Sala	ary Reserve Wage Detail						
	UFR Title I	No. of	FTEs	Total An	nual Wages	Averag	e Salary
Assistant Program Director Licensed Counselor Direct Care I/Program Staff Case Worker			1.0 14.0 50.0 2.0	!	\$23,500.00 \$328,337.00 \$1,014,309.00 \$49,691.20		\$23,500.00 \$23,452.64 \$20,286.18 \$24,845.60
Contract Detail							
ID	Contract No	Dept	Activity Code	FTEs <=\$40K	Annual Salaries FTEs <=\$40K	% of Program Purchased by Dept.	Adjusted Salaries <=\$40K
47	526605660343DMR00000	DMR	3036		\$1,014,309.00	100%	\$1,014,308.94
49	INTF0000009950619700	DSS	RESG	2.0	\$49,691.20	100%	\$49,691.20
50	SCDMH431050040830000	DMH	3049	14.0	\$328,337.00	100%	\$328,337.00
							\$23,500.00

Viewing Purchase of Service (POS) Salary Reserve Page Click the <u>Salary Reserve Updates</u> link from the navigation bar, to view the latest information about Salary Reserve.



The Purchase of Service (POS) Salary Reserve page appears.

Purchase of Service (POS) Salary Reserve

July 12, 2006 Update

With the expectation that the FY07 budget may contain a Salary Reserve line item, EOHHS is planning the necessary steps and activities for managing and distributing the reserve in an accurate, timely and efficient manner.

To facilitate collection of FYD7 contract data, EOHHS is upgrading the current version of the Provider Data Management (PDM) service. As most of you know, PDM is a Virtual Gateway business service that was made available to Purchase of Service (POS) providers and EOHHS state agencies during the summer of 2005. The new PDM release will enable POS providers to submit payroll information (e.g., FTE counts, annual salaries, and other information) required to support the allocation of the Reserve over the Internet. Once purchasing agencies have verified the accuracy of the information submitted by providers, EOHHS will calculate the salary reserve allocation for eligible employees.

In order to use PDM to submit Salary Reserve payroll information, all providers must have active accounts on the Virtual Gateway and specifically with the PDM service. During the weeks of July 10 and 17, EOHHS is emailing information to providers regarding actions they must take in order to update their existing or activate a new account on the Virtual Gateway.

FY07 Salary Reserve Administration Timeline:

As has been the case in previous years, timeline for the Salary Reserve is designed for the first Reserve payments to occur during the beginning of December. In order to meet this timeline and be eligible for Salary Reserve funds, it is critical that providers adhere to the timeline outlined below.

- August 31, 2006: Deadline for providers to complete, sign, and submit to the Virtual Gateway Team all forms and documents required to gain access to the PDM system. All providers should have received instructions via email or regular mail by July 20th on what they need to do in order to meet this deadline.
 September 7 29, 2006: Payroll data submission period. The deadline for providers to submit via the PDM system all payroll and salary information required for allocation of the FY07 Salary Reserve funds is September 29th. Information cannot be accepted for the FY07 Salary Reserve after this date.
 November 13, 2006: Individual provider allocation amounts announced. Appeals process, notes.
- process opens.

 January 12, 2006: Deadline for receipt of provider appeals regarding amount of FY07 Reserve allocation.

Please direct all questions regarding the PDM deployment process to the Virtual Gateway Help Desk. The Help Desk number is 1.800.421-0938.

Additional Milestones:

Date	Milestone
08/31/06	Deadline for providers to submit any required VG or PDM enrollment material
09/07/06	PDM is open to salary reserve providers for submission of payroll information
09/29/06	Deadline for submission of provider payroll information
10/02/06 to 10/20/06	Purchasing agency review and confirmation period
11/13/06	Notice to providers on amounts allocated. Information posted on salary reserve webpage
11/13/06	Allocation appeal process opens for providers who wish to dispute their allocation
11/17/06	Salary reserve contracts emailed to Providers for signature
12/08/06	First scheduled payments out to Providers
01/12/07	Appeals period closes, all allocations are final
02/02/07	All salary reserve amendments finalized and processed
02/14/07	Salary reserve reports delivered to the Legislature and posted on the webpage

Download	Format	
PDM Checklist	PDF	DOC
Virtual Gateway Service Agreement	PDF	DOC
Virtual Gateway Access Administrator Form	PDF	DOC
Virtual Gateway User Request Form	PDF	DOC
Virtual Gateway Roles Matrix	PDF	XLS





Chapter 4: Glossary

Introduction

The following table lists the data elements and their definitions for the Salary Reserve Data Collection Application.

Tip: Asterisk denotes required field.

Data Element	Definition
Contractor name	Agency name as used in articles of incorporation or organization.
*Contact person	The name of the person who can answer Salary Reserve questions about the survey, should any arise.
*Telephone	The contractor's telephone number, including area code and extension, if any.
FEIN	9 digit federal employer identification number (FEIN).
*FY 2007 contract number	20 digit MMARS contract identification number.
*Dept.	3 letter identifier of the department with whom contractor has a contract.
*Full-time equivalents earning less than \$40,000 in program	The number of eligible employees (full and part time) in terms of full time equivalents (FTEs) earning less than \$40,000 that work in the program.
*Annual salaries of employees earning less than \$40,000 in program	The annual salaries of eligible employees earning less than \$40,000 for the portion of their time attributable to a program.
*Percentage of	This is the percentage of the program that is



Data Element	Definition
program purchased by department	purchased by the department.
Annual salaries less than \$40,000 attributable to this contract and program	No entry (see note below). This column is calculated by a built-in formula that multiplies percentage of program purchased by eligible salaries of <\$40,000.
*MMARS activity code	Enter the MMARS activity code associated with the listed program.
Accounting Line Number (optional)	Enter the accounting line number associated with the listed program.

